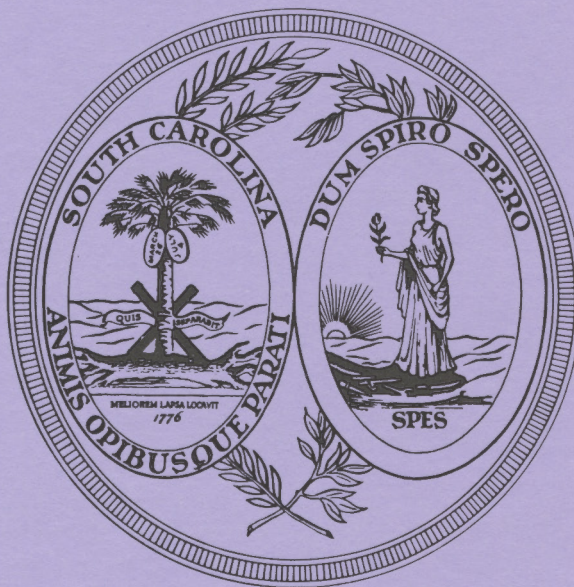


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# **SOUTH CAROLINA STATE DEVELOPMENT BOARD**



## **ANNUAL REPORT 1991-1992**

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State Budget And Control Board

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STATE DOCUMENTS



SOUTH CAROLINA  
STATE DEVELOPMENT BOARD

Columbia, South Carolina

October 15, 1992

To: His Excellency Carroll A. Campbell, Jr., Governor, and  
Members of the General Assembly

On behalf of the South Carolina State Development Board, I have the honor to transmit herewith its Annual Report, which outlines the activities of the Board and its staff during the 1991-92 fiscal year ending June 30, 1992.

Despite the vagaries of the national economy, the state continued to grow and expand. The State Development Board is able to report that during the fiscal year more than \$3 billion in new and expanded investments resulting in nearly 14,000 direct new jobs were announced. These announcements resulted in a 127% increase in investments and 47% increase in employment growth over the previous fiscal year.

Foreign-affiliated firms announced \$1.3 billion in new and expanded investments in the state. The Development Board also is proud of its efforts to encourage existing industry to grow. The state's success in this endeavor is reflected in the fact that existing firms accounted for 70% of the investment total for the fiscal year.

As it has each year since its creation, the State Development Board works diligently to foster development activity that will sustain the state's economy.

Respectfully submitted,

WAYNE L. STERLING

Executive Director

William Floyd

Director  
Administration and  
Information Technology

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## DEVELOPMENT BOARD MEMBERS

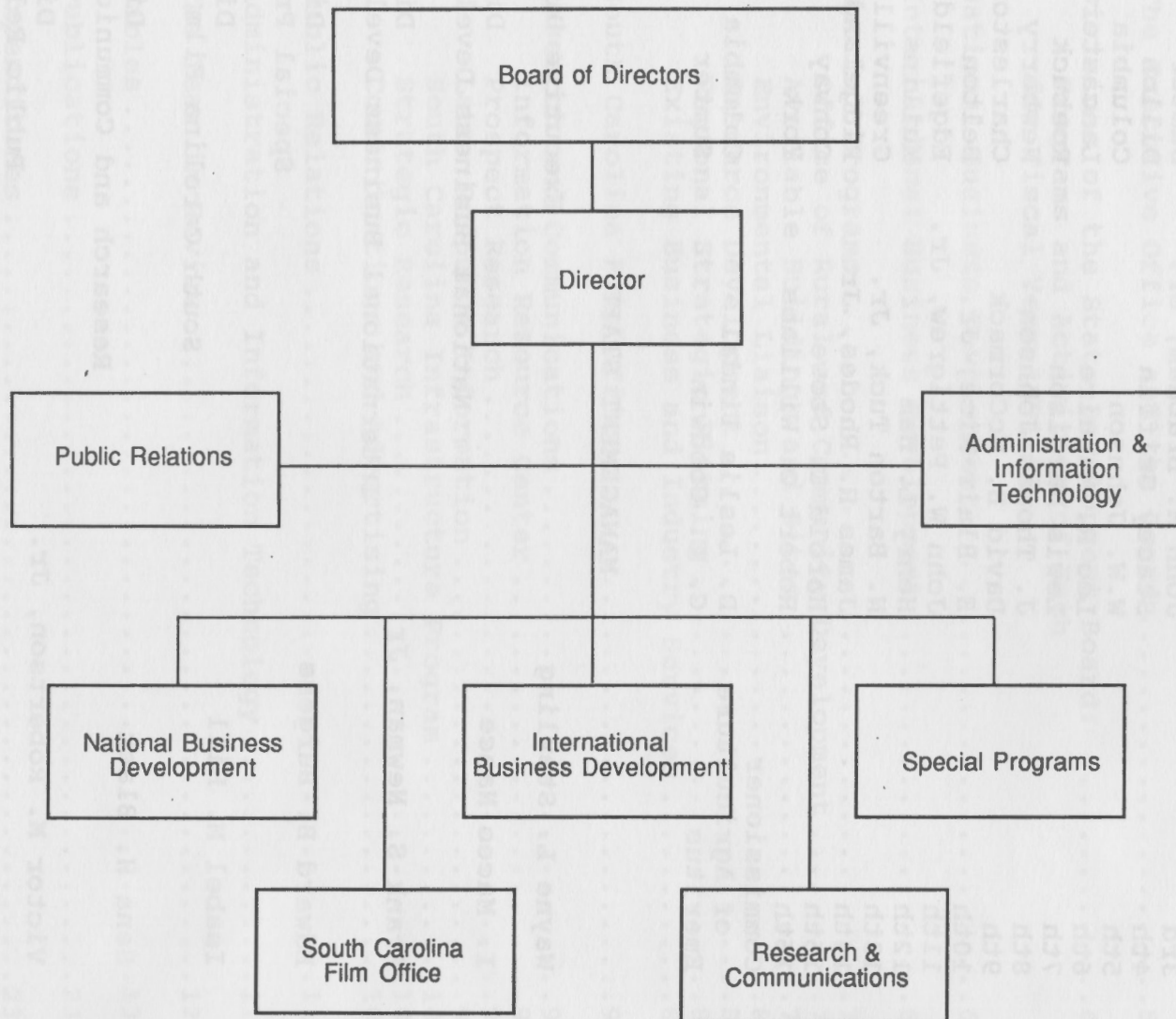
<u>Judicial Circuit</u>	<u>Name</u>	<u>City</u>
Chairman	John A. Warren	Columbia
At Large	Norman J. Arnold	Columbia
At Large	Joseph T. Newton, III	Charleston
1st	William B. Cox, Jr.	Orangeburg
2nd	O'Neal Laird	Blackville
3rd	John M. Brabham, Sr.	Sumter
4th	Stacey Griffin	Dillon
5th	W.W. Johnson	Columbia
6th	Leo R. Maguire	Lancaster
7th	Lewis Harrison	Roebuck
8th	J. Thomas Johnson	Newberry
9th	David B. McCormack	Charleston
10th	E. Blair Rice, Jr.	Belton
11th	John W. Pettigrew, Jr.	Edgefield
12th	Henry L. Ham	Mullins
13th	N. Barton Tuck, Jr.	Greenville
14th	James R. Rhodes, Jr.	Ridgeland
15th	Harold C. Stowe	Conway
16th	Robert O. Williams	York
Commissioner of Agriculture	D. Leslie Tindal	Columbia
Emeritus	C. C. Goodwin	Sumter

## MANAGEMENT STAFF

Wayne L. Sterling	Executive Director
I. Maceo Nance	Director National Business Development
Frank S. Newman, Jr.	Director International Business Development
Edward B. Burgess	Director Special Programs
Isabel M. Hill	Director South Carolina Film Office
Sena H. Black	Director Research and Communications
Victor M. Robertson, Jr.	Director Public Relations
William Floyd	Director Administration and Information Technology



# South Carolina State Development Board Organizational Chart



## HISTORY

A small number of independent business leaders launched South Carolina's first "development group" in 1919. The South Carolina Development Board, as it was named, received no state funding, although it was enthusiastically supported by the Governor. Instead, it operated much like a chamber of commerce, soliciting members and supporting itself through \$10 membership dues. The bylaws of the first Development Board were adopted at the first meeting in Charleston on July 14, 1920.

Its purpose was to promote the general welfare of the people of South Carolina, and it was to accomplish this mission through marketing the state's crops; developing forage crops, grains and grasses; improving highways; and strengthening the educational system. The Development Board merged with the South Carolina Chamber of Commerce on November 15, 1920.

Records for the next 17 years are incomplete and show only that a number of boards and committees were appointed to study various issues such as building needs of state institutions, development of the state's water resources, and ways to better plan for the state's future. Apparently, no formal development organization was in existence during this period.

In 1938, the General Assembly enacted legislation creating the State Planning Board. The staff of nine members, a director and two technicians began their research to identify the industrial resources of South Carolina, but the survey was never completed. Studies did reveal, however, that urgent needs in 1940 were for more jobs, identifying more markets for agriculture products, more business for merchants and more taxable property to finance government services. Target industries included rayon, ladies' apparel, chemicals and rubber tires.

By 1944, the concentration shifted to attracting industry that would support the wartime effort, such as dehydrated foods, plastics, woolen and worsted textiles, cement, chlorine alkali, aluminum and tin smelting. During these years, the first organized, state-supported development effort was inaugurated when the Preparedness for Peace Commission was established in 1942. The Commission's task was to investigate, study and report to the General Assembly a recommended program for development that would aid the state in its transition from a wartime to a peacetime economy. With a \$15,000 operating budget, the Commission recommended the creation of a state agency to promote the orderly development of South Carolina.



In 1945, the General Assembly created the Department of Research, Planning and Development, abolishing the Preparedness for Peace Commission. Governed by a five-member board, it was required to coordinate operating agencies in their development of plans; to coordinate studies pertaining to its own objectives; to study area problems; to establish local agencies; to advertise the state; and to provide information for and make contacts with private businesses for the purpose of acquainting them with opportunities in South Carolina. In addition, it was vested with state-level control over planning and development of housing and building, commerce, intercoastal waterways, ports, international trade and natural resources. The actual administration of these activities was eventually transferred to other agencies.

Though the agency was empowered with duties and responsibilities far beyond specific industrial development, its major thrust was to offer assistance to existing industry and to provide assistance to outside industry interested in South Carolina. The agency's divisions included Advertising, Public Relations and Tourism. The name of the department was changed to the State Development Board in 1954.

In 1959, the State Development Board's objectives shifted, as the agency became more aggressive in attracting industry to the state. With a significant increase in its budget, a professional staff to implement a development program, and a policy-making board of successful businessmen, the agency was reorganized to pursue the following objectives: to raise the standard of living; to further the development of agricultural-related industry; and to promote the further diversification of industry. It was to accomplish these objectives through the creation of locally developed "internal industries"; a community relations program that encouraged regular contact with local development boards; an active advertising and public relations program; and an Industrial Development Division with data development and an Agricultural Existing Industry Division.

During the postwar economic boom, South Carolina experienced a record-breaking industrial surge. The progress continued into the 1960s, with emphasis on expanding the industrial base to include food processing and packaging, forest products, minerals, metalworking, chemicals, electronics and agriculture-related industries. The State Development Board also aggressively sought the fledgling nuclear industry and directed its marketing efforts toward Europe. In 1967, the Department of Parks, Recreation and Tourism was created out of the State Development Board's Division of Tourism and Travel and the Forestry Division.

During the 1980s, the Development Board became more proactive in the area of international development, establishing offices in Tokyo, Japan, and Frankfurt, Germany, as well as hiring consultants to assist in the Far East — including South Korea — the United Kingdom and Germany. New initiatives in the decade included the Office of Rural and Community Development, a targeted marketing program, and the South Carolina Infrastructure Planning Project (SCIP). In 1986, members of the Board decided the agency's mission was to provide leadership in the maintenance of an environment conducive to private sector development in the state for the purpose of creating wealth and opportunity for its citizens.

#### THE EXECUTIVE OFFICE AND THE BOARD

In consultation with the Board, the Executive Director is responsible for the overall management of the agency, which includes policy development, long-range planning and resource development. The Director's Office is the focal point for the agency's accountability to the public. During Fiscal Year 1991-92, the Director's Office was responsible for managing budget processes, and coordinating agency policies and programs.

The governing and policy-making body for the activities of the agency is the Board. Each year, the Board adopts objectives and programs for achievement in consultation with the Executive Director and the Executive Staff.

Of the 21 board members, 19 are appointed by the Governor, with the advice and consent of the Senate. One member is appointed from each of the 16 Judicial Circuits, and three members are appointed from the state at large. One of the at-large members is appointed by the Governor to serve as Chairman. The state Commissioner of Agriculture also serves on the board, and in 1989, Board Member C. C. Goodwin was named Board Member Emeritus.



THE FOLLOWING IS A BRIEF DESCRIPTION OF THE  
VARIOUS DIVISIONS OF THE STATE DEVELOPMENT  
BOARD AND THE PROGRAMS AND ACTIVITIES  
OF EACH FOR THE FISCAL YEAR 1991-92

NATIONAL BUSINESS DEVELOPMENT

The Division provides professional economic development services to officials of domestic companies and their consultants to assist them in evaluating South Carolina as a site for establishing business activities. In carrying out its mission, the National Division is expected to take a leadership role in project services. At the same time, the Division is responsible for cultivating economic development for South Carolina that relies heavily on public and private ally networks.

During the fiscal year, the Division coordinated 413 in-state prospect visitations, initiated 327 new projects and responded to 2,112 leads generated through the agency's advertising program. In addition, the Division coordinated and participated in out-of-state marketing missions to the Boston/Hartford, Chicago/Milwaukee, Los Angeles and San Diego, Philadelphia/Wilmington, targeting 3,041 firms and making personal contact with 157 of those firms, from which it identified 72 new projects.

Domestic business and industry continued to show interest in South Carolina as a possible location for investment in Fiscal Year 1991-92. Announced new capital investment in the state by domestic corporations totaled \$485.4 million for the fiscal year, resulting in 4,811 new jobs for South Carolinians.

INTERNATIONAL BUSINESS DEVELOPMENT

The Division provides professional economic development services to officials of international companies to help them evaluate South Carolina as a site to establish business activities and works with South Carolina companies to encourage the expansion of export and trade activities.

During the fiscal year, the Division handled 92 investment projects and 143 in-state visits, and followed up on 144 inquiries. For the fiscal year, foreign-affiliated investments in South Carolina totaled \$1.3 billion and accounted for nearly 5,000 new jobs.

In the area of trade, the staff organized and participated in seven catalog/trade shows that involved 124 South Carolina companies (G'BOC '92 in Osaka, Japan; Represenaciones '92 in Guadalajara, Mexico; Council of

American States in Europe in the United Kingdom, Germany, Austria and Switzerland; U.S. Trade Days in Latin America in Colombia, Venezuela and Mexico). In addition, staff hosted 13 buying missions involving 86 South Carolina companies, and generated 10,949 trade leads to in-state companies through a new trade lead export database.

In the area of marketing, trips were made to New York, Toronto, Atlanta and Los Angeles, and 72 contacts were made with government and business officials. Also, staff made contacts with 41 foreign companies in South Carolina.

The International Business Development Division also participated in the annual meetings of the Southeast United States/Korean Economic Committee, the Southeast United States/Japan Association meeting, and a trade and investment mission to Taiwan.

#### SPECIAL PROGRAMS

The Division contributes to the agency's effectiveness in expanding the industrial and commercial base through several diverse programs, including the Office of Rural and Community Development, Available Buildings and Sites Information, Environmental Liaison, Resource Development, Regional Strategic Planning and Existing Business and Industry Services.

##### Office of Rural and Community Development

This office improves the development potential of non-metropolitan counties through a leadership development program and the building of local strategies relevant to community economic development. During the fiscal year, five new communities/counties participated and were in various stages of developing local economic development strategies. Also, the second Governor's Rural Summit was held and was attended by more than 300 state and local leaders.

##### Available Buildings and Sites

Existing industrial buildings vacated as a result of a plant closing are an important resource for industrial recruitment efforts. During the fiscal year, staff made recommendations on buildings and sites to staff, made monthly mailings of available buildings, visited all 46 counties to inspect buildings and collect information, and prepared flyers on 84 buildings. Of the new plants located in the state during the fiscal year, 35 moved into existing buildings.



## Environmental Liaison

As part of its services to the state's existing industries and for new firms locating in the state, the Development Board provides liaison between environmental regulatory agencies. The services are essential to minimize environmental conflicts during the planning stage of projects. Local areas also are provided assistance in the evaluation of their infrastructure and its ability to support economic growth.

## Resource Development

Resource Development staff provides professional training opportunities for staff and for economic development professionals in the state. This fiscal year, staff supported the quarterly Allies Meetings, training sessions associated with the Allies Meetings and the Economic Development School at the College of Charleston, which became self-supporting. Sales and marketing training for the Development Board staff was initiated during the year. Additionally, the program evaluated the financing needs of 107 companies and recommended available financing alternatives.

## Regional Strategic Planning

A new program of the State Development Board, staff secured a one-time grant of \$60,000 from the Appalachian Regional Commission for a pilot project with the Appalachian Council of Government. Staff also assisted in the development of a regional steering committee, which developed issues statements and a mission statement for the Appalachian Regional Development Partnership.

## Existing Business and Industry Services

The Department continues to promote economic stability and development through a strategy that encourages expansion of existing industries and the retention of existing jobs. Field agents visited 785 South Carolina companies during the fiscal year, providing follow-up assistance to 590 firms. In-depth project assistance was given to 30 firms on expansions, of which five projects were competitive. The Existing Business and Industry Services Department continued to be a member of the "Rapid Response" team under a Jobs Training Partnership Act grant. Staff provided aversion assistance to 21 firms. A Palmetto Ambassador recognition effort was continued to acknowledge existing business persons who have contributed their time to help convince companies to locate in South Carolina. Thirty-five recipients received the Governor's award. Also, staff coordinated the second annual Industry Appreciation Week to honor the state's existing businesses.

## SOUTH CAROLINA FILM OFFICE

The South Carolina Film Office recruits and facilitates motion picture, television and commercial production and fosters the development of an indigenous film industry.

During the fiscal year, two feature films and six made-for-television movies were filmed in the state. Also, 15 short format television programs and 24 commercials were shot on location in South Carolina.

Also during the year, the Film Office represented the state on four prospecting missions to Los Angeles, including two national trade shows and one international trade show. The Division also assisted development plans for a film studio and published a new production manual.

## RESEARCH AND COMMUNICATIONS

The Division promotes economic development at the state and local levels through responsive and proactive research and communications programs.

### Information Resource Center

The Information Resource Center published the "1992 Industrial Directory" and continued to maintain the capital investment and employment database that monitors economic development activity in the manufacturing, research and development, corporate office and distribution sectors. Staff also produced two industry sector supplier reports and maintained a variety of company listings. Staff updated and maintained community profiles on 111 communities; maintained and published profiles on the state, metropolitan areas and counties; produced a tax millage report by county; prepared special analysis on taxes and incentives in southeastern states; and assisted 5,100 clients with requests for information.

### Prospect Research

The Department develops targeted customized proposals to market South Carolina and individual communities to firms considering locating and expanding in the state. During the fiscal year, 160 proposals were completed, and 22 customized prospect presentations were made. Proposals were completed for 28 companies that announced investments in state, including multiple proposals for Hoffmann-La Roche and BMW.

### Labor Resource Information

During the fiscal year, the Division continued a program to evaluate the state's labor pool in terms of staffing new or



expanding firms. The program provided customized reports to industrial prospects that describe in detail the quantity, quality and wage levels of the labor market throughout the state. During the year, the Division produced labor profiles for 530 projects for Development Board and ally needs, and produced 121 standardized profiles on communities and a state overview.

#### South Carolina Infrastructure Program (SCIP)

The South Carolina Infrastructure Program uses state-of-the-art geographical information systems (GIS) technology to develop a database on infrastructure, economic and business information. The primary goals of this program include the development of customized prospect research and the development of a statewide network of regional GIS centers. During the fiscal year, the Department continued the implementation of statewide databases, developed advanced applications for the site selection process and assisted with 87 prospect projects that included 204 customized and 639 standard maps and displays.

#### Strategic Research

A strategic market analysis program identifies and develops business development opportunities for increased diversification of the economy and higher levels of per capita income. During the fiscal year, the following industries were targeted: pharmaceuticals and other drug-related products, information services, biomedical products and steel. For each target industry, an analysis of site location factors and the state's advantages for the industry was completed. In addition, more than 3,000 companies for potential investment opportunities were identified for marketing team trips to Boston-Hartford, Chicago-Milwaukee, Los Angeles-San Diego and Philadelphia-Wilmington, which resulted in 72 active projects.

#### Communications and Advertising

During the fiscal year, staff produced a series of communications materials to promote the state nationally and internationally. The Department also managed the State Development Board's advertising contract, overseeing production and budget for the creation and placement of ads in national, international and film publications. These ads, which promote South Carolina to specific targeted audiences, generated more than 2,000 inquiries, 167 qualified leads and 21 projects. The communication and advertising materials won the American Economic Development Council's Special Judges Award for their overall quality. Also, a cooperative ad program with economic development allies was continued.

## PUBLIC RELATIONS

The Division supports economic development activity at state and local levels by promoting the agency to the general public and the media, and by assisting economic development allies with their activities, effective governmental relations and through the selective use of promotional projects and events to develop prospect leads.

During the fiscal year, the Division assisted with local announcements and groundbreakings, published quarterly magazine "Economic Developments," worked with national and international magazines to promote the state and coordinated publicity for Development Board projects, meetings and events.

The Division also arranged the Development Board's participation in the Heritage Tournament. In addition, staff managed a special event associated with the Ryder Cup near Charleston.

## ADMINISTRATION AND INFORMATION TECHNOLOGY

This Division provides internal administrative support and control services for the entire agency.

Its functions include budgeting, accounting, personnel, procurement/supplies, fixed-asset inventory control, office services, switchboard and receptionist services, and the assignment and maintenance of the agency's state automobiles. The Division also is responsible for the maintenance and use of the agency's aircraft as well as for the agency's computer resources.



## THE YEAR IN REVIEW

South Carolina continues to build on its economic development momentum with high level growth, despite the vagaries of the national economy, reporting more than \$3 billion in total capital investments and creating 13,846 direct new jobs for the fiscal year (See Tables).

Capital investment this fiscal year showed a dramatic increase of 127% over the previous year and was the third best over the last five years. Employment growth increased 47% over the previous fiscal year.

The manufacturing sectors of chemicals, metals and equipment, and headquarters led the capital investments, accounting for 74% of the announced total, and metals and equipment, chemicals and headquarters led in the creation of new jobs, with 58% of the total.

Foreign-affiliated firms continued to contribute heavily to the state's investment numbers, with more than \$1.3 billion in new and expanded investments reported.

Rural areas of the state attracted 34% of the new jobs for the fiscal year, and urban areas accounted for 76% of the investments.

Existing businesses continued to fuel the state's economy, as well, accounting for 70% of total capital investments and 49% of new jobs.

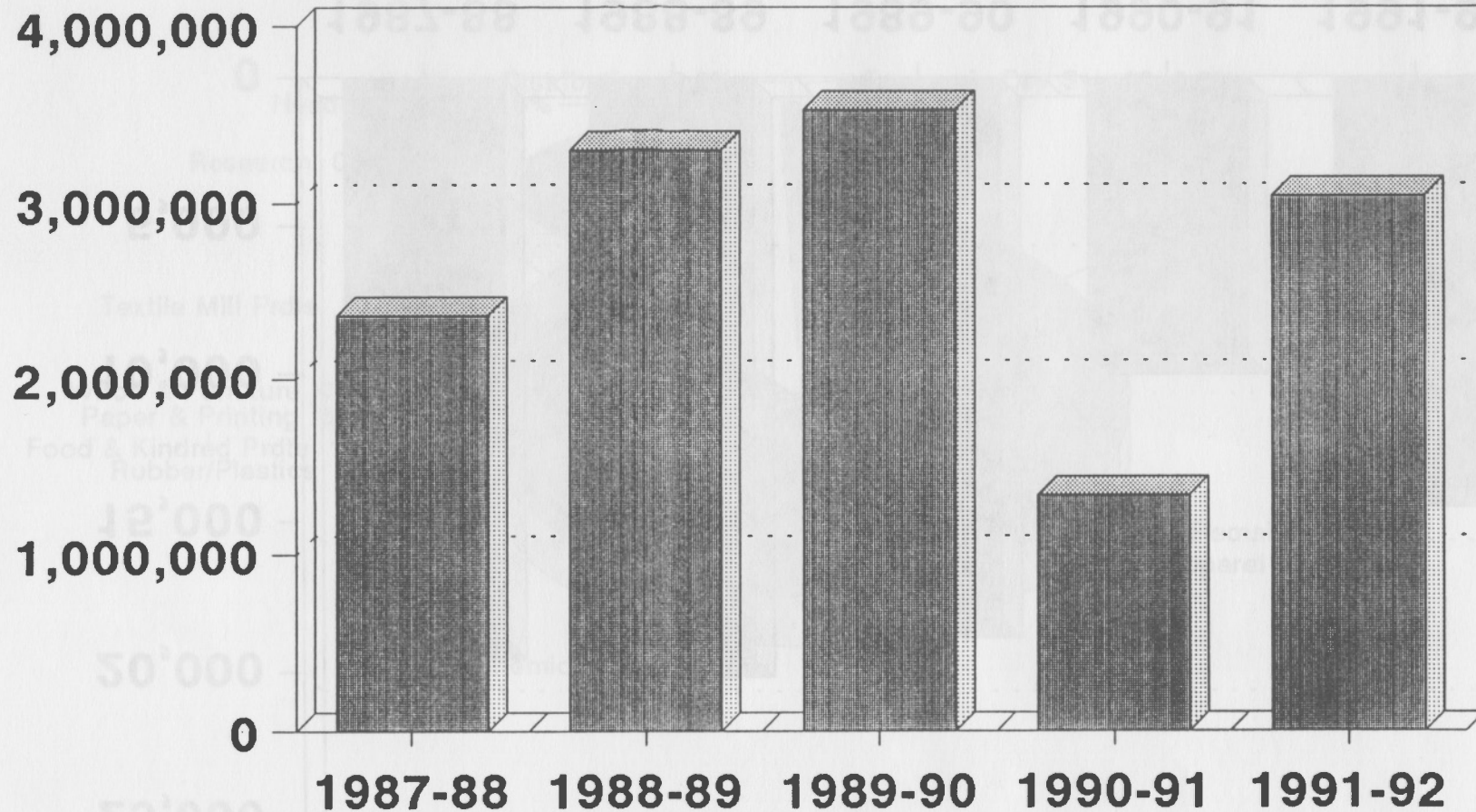
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# Capital Investments

## By Fiscal Year

Investment (\$000)



Total	2,366,789	3,297,527	3,522,983	1,339,011	3,039,102
# of Firms	765	792	809	524	603

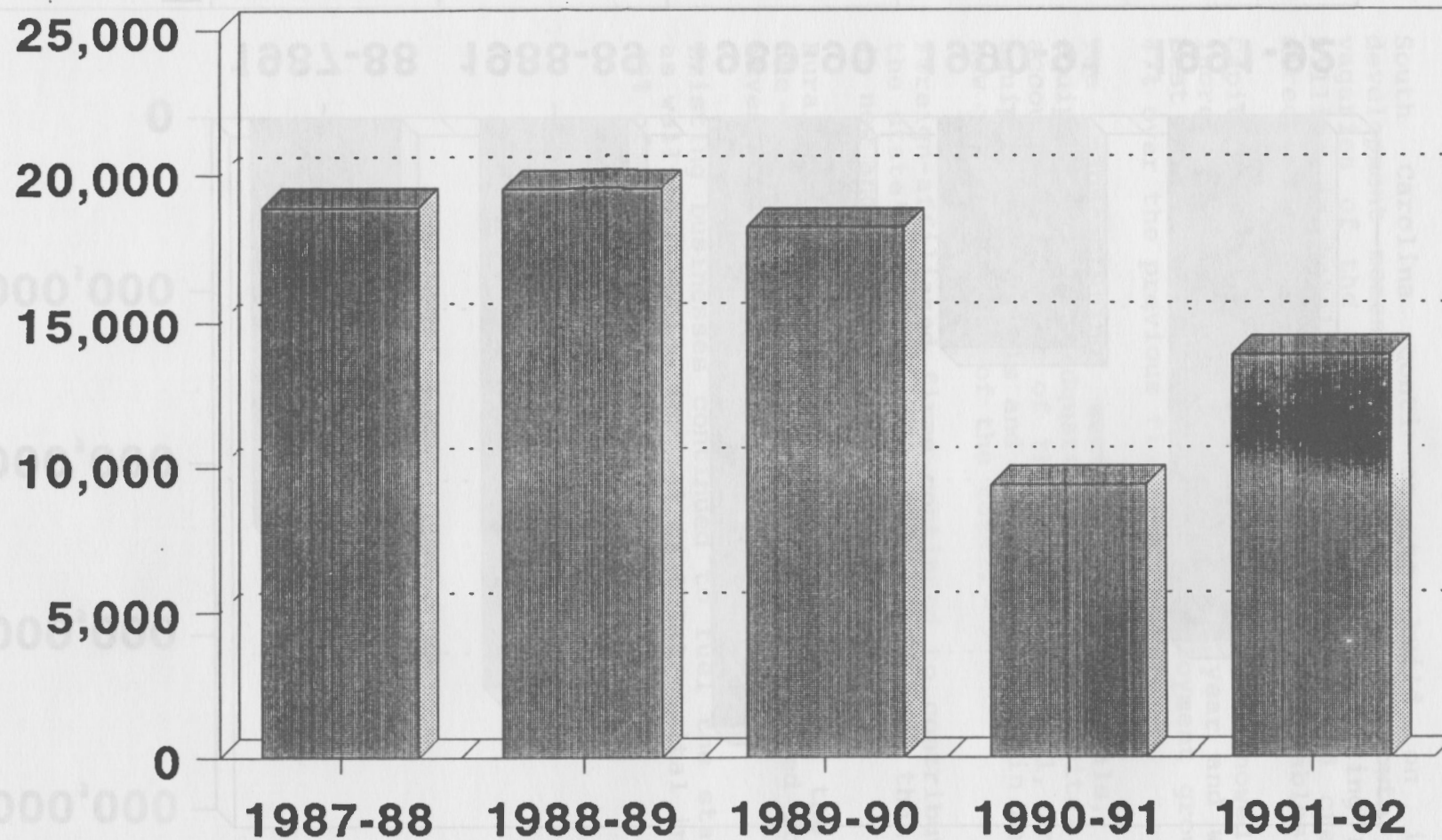
Includes, Mfg, Distribution Corp Headquarters, Research, and Computer Related Services  
Existing represents the additional investment created by investment at existing facilities.

Source: Division of Research and Communications, S.C. State Development Board.



# Employment From Capital Investments

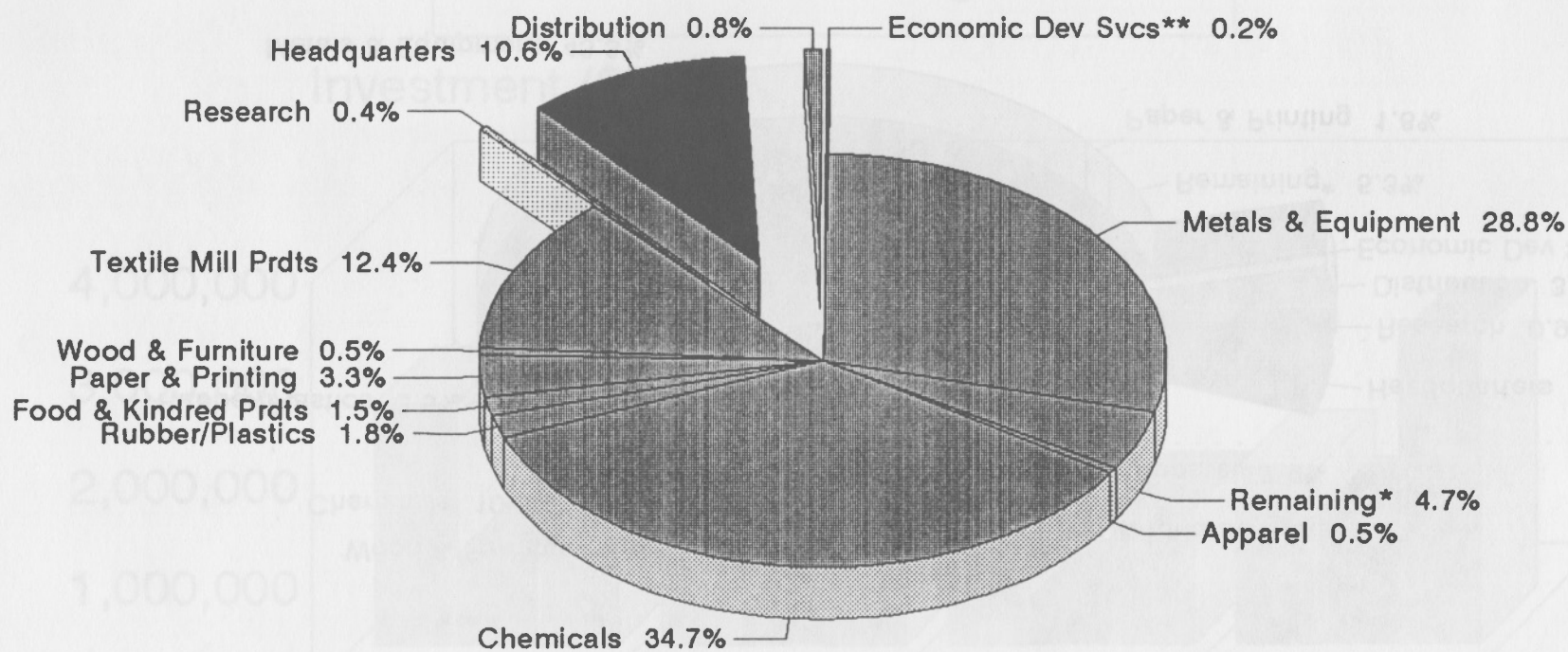
## By Fiscal Year



Total	18,908	19,526	18,233	9,372	13,846
# of Firms	765	792	809	524	603

Includes Mfg, Distribution, Corp Headquarters, Research and Computer Related Services  
 Existing represents the additional employment created by expansion at existing facilities  
 Source: Division of Research and Communications, S.C. State Development Board

# FY 1991-1992 % OF CAPITAL INVESTMENT BY INDUSTRY



## Investments

Domestic	2,392,372	2,300,413	671,569	1,745,845
Foreign	805,155	803,142	1,292,457	
Total	3,297,527	3,522,953	1,339,011	3,038,102

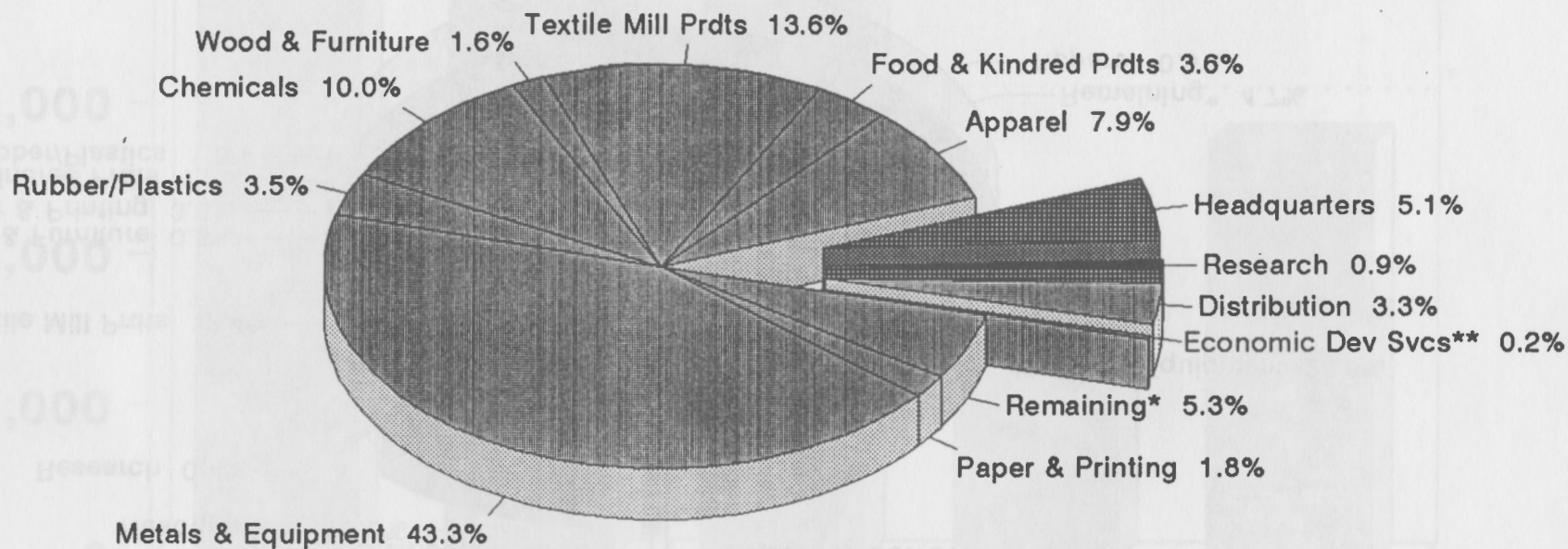
\*Represents Petroleum, Leather; Stone, Glass, and Concrete; Remaining Mfg; and Tobacco

\*\*Represents Computer Related Svcs

SOURCE: Division of Research and Communications, State Development Board



# FY 1991-1992 % OF CAPITAL EMPLOYMENT BY INDUSTRY



## Employment

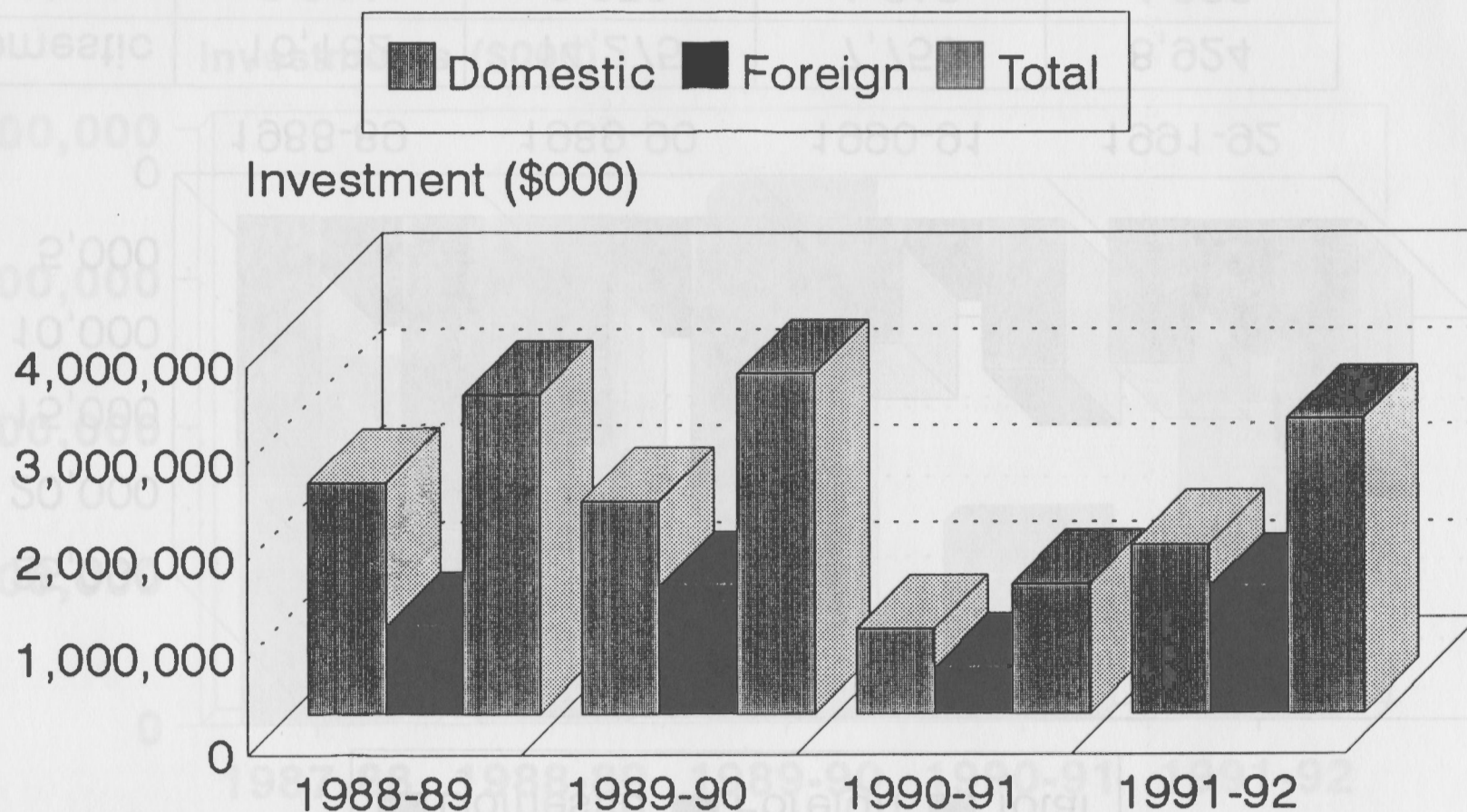
\*Represents Petroleum; Leather; Stone, Clay, Glass, and Concrete; Remaining Mfg; and Tobacco

\*\*Represents Computer Related Svcs

SOURCE: Division of Research and Communications, S.C. State Development Board

# Capital Investment

## By Fiscal Year



Domestic	2,392,372	2,200,113	871,869	1,746,645
Foreign	905,155	1,322,870	468,142	1,292,457
Total	3,297,527	3,522,983	1,339,011	3,039,102

Includes Mfg, Distribution, Corp Headquarters, Research and Computer Related Services

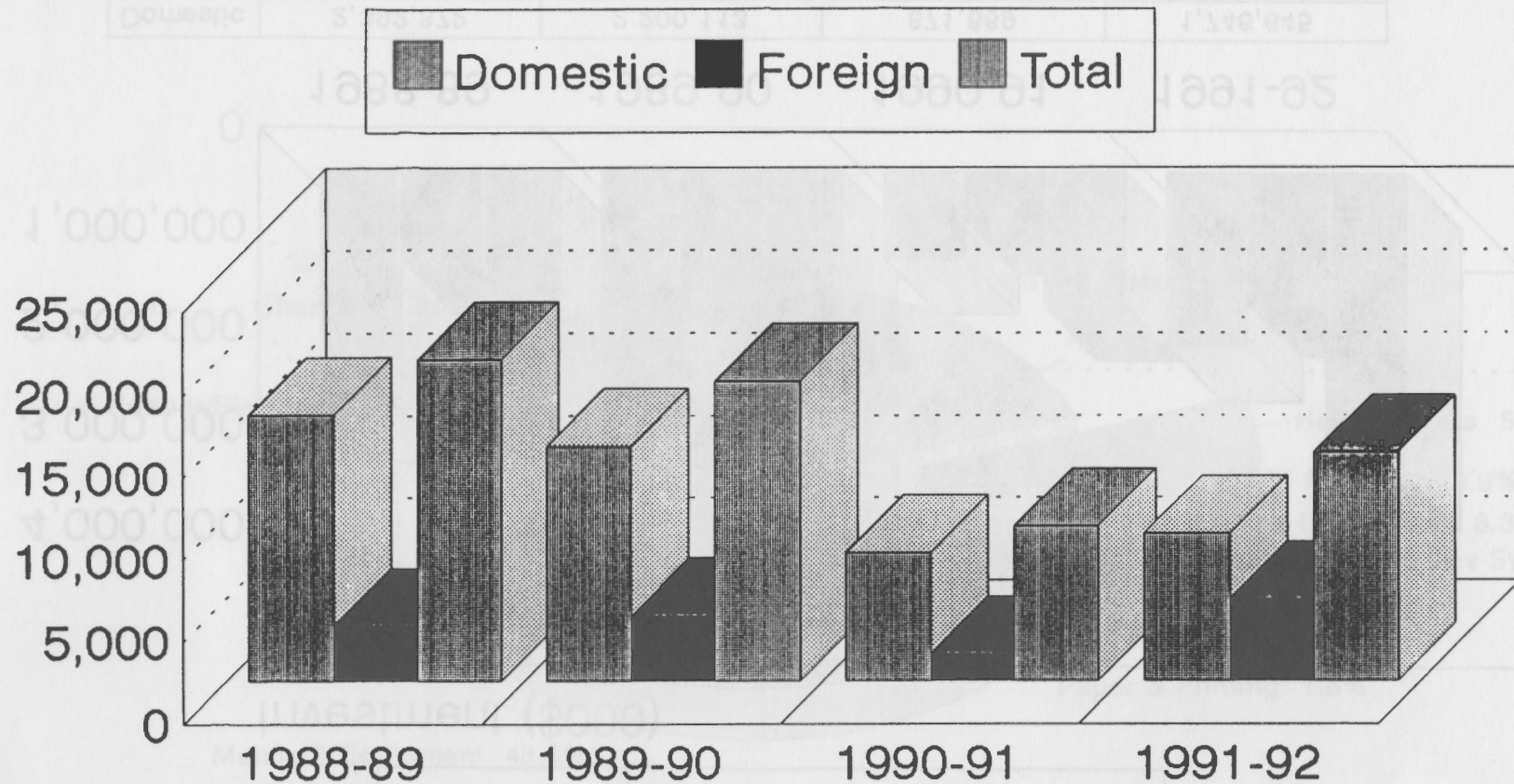
Existing represents additional investment created by expansion at existing facilities

SOURCE: Division of Research and Communications, S.C. State Development Board



# Employment From Capital Investment

By Fiscal Year



Domestic	16,182	14,275	7,756	8,924
Foreign	3,344	3,958	1,616	4,922
Total	19,526	18,233	9,372	13,846

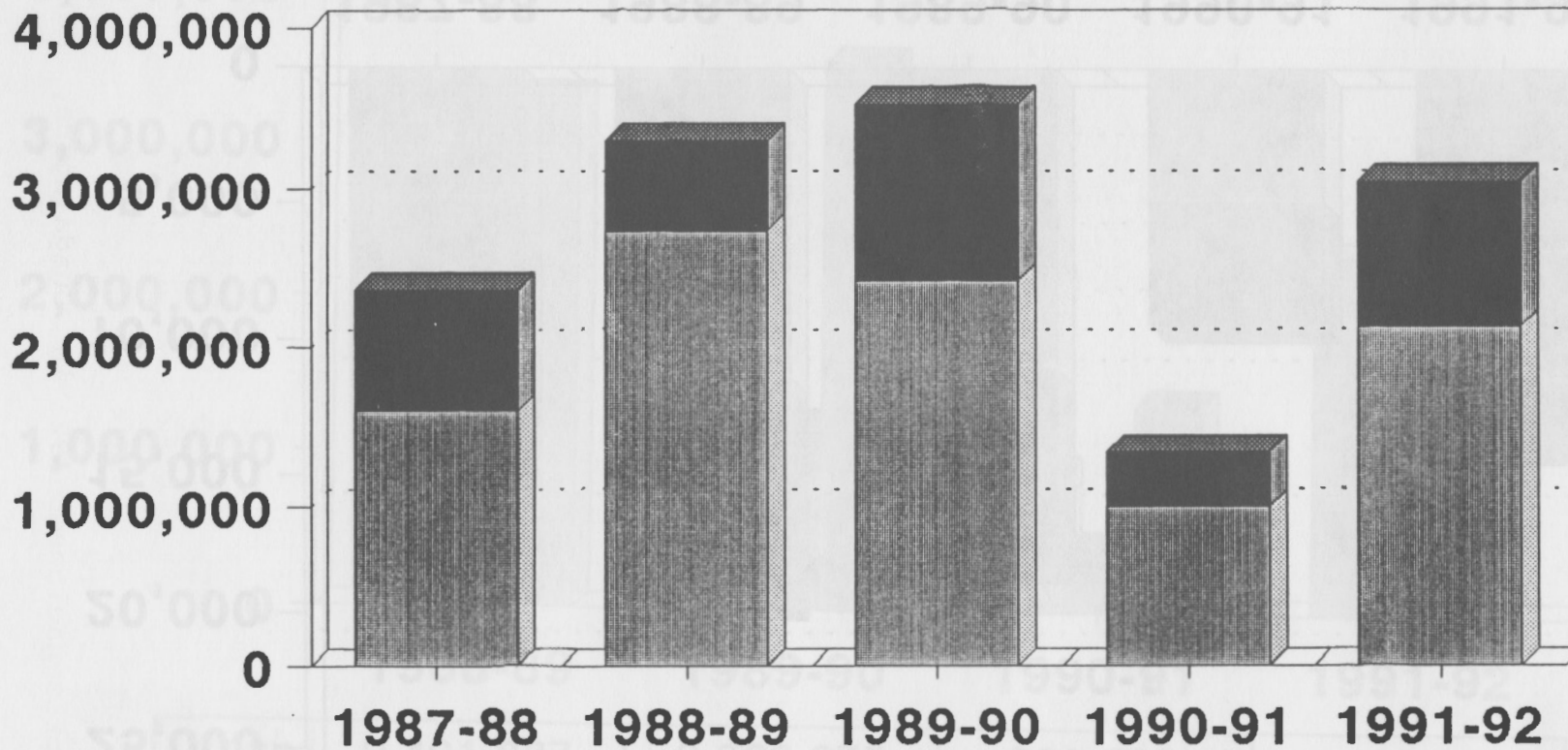
Includes Mfg, Distribution, Corporate Headquarters, Research and Computer Related Services  
 Existing represents additional employment created by expansion at existing facilities  
 SOURCE: Division of Research and Communications, S.C. State Development Board

# Capital Investments

By Fiscal Year

Existing New

Investments (\$000)



Total	2,366,789	3,297,527	3,522,983	1,339,011	3,039,102
New	770,615	561,620	1,099,035	341,405	919,496
Existing	1,596,174	2,735,907	2,423,948	997,606	2,119,606

Includes, Mfg, Distribution, Corp Headquarters, Research, and Computer Related Services

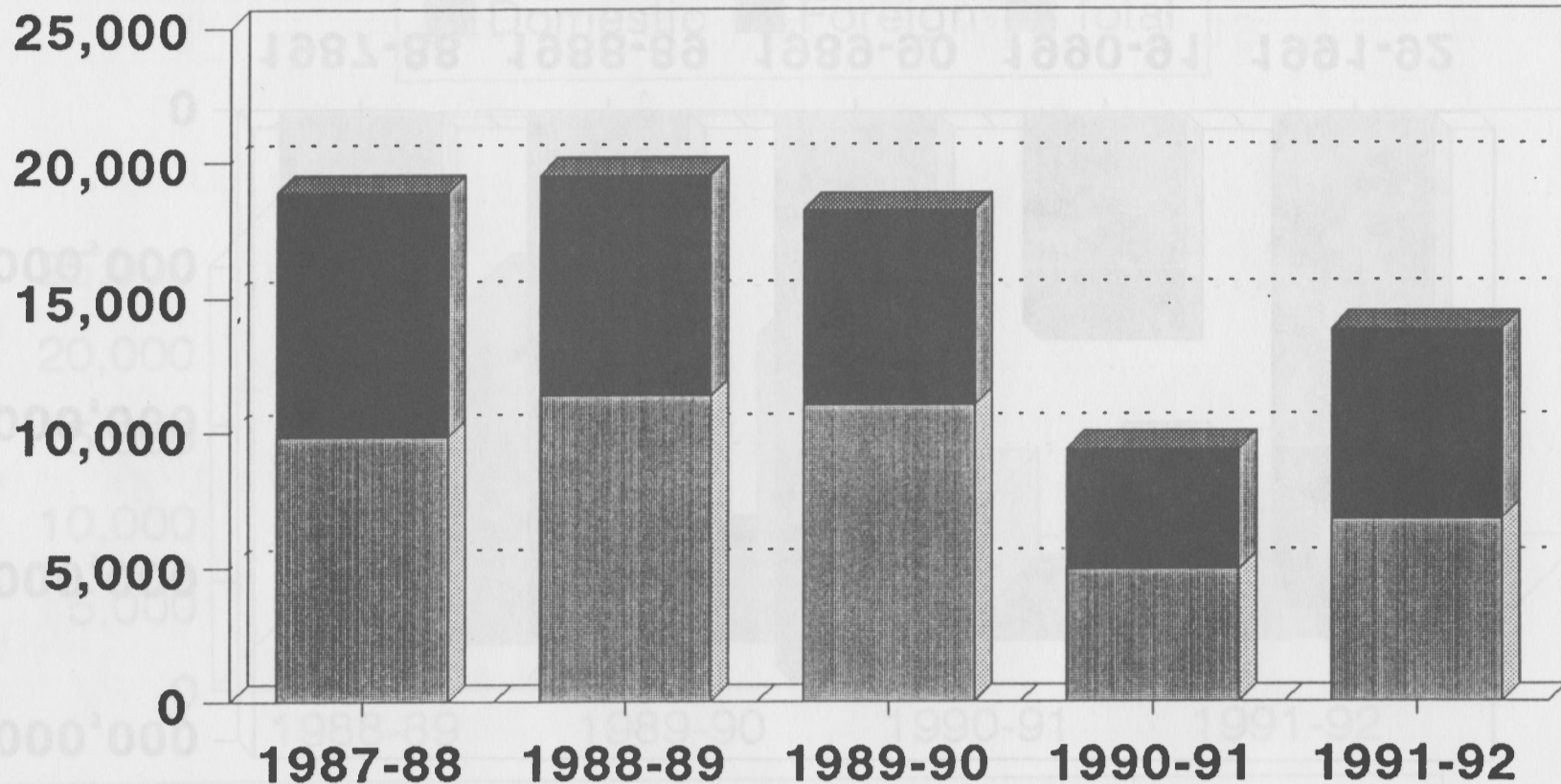
Existing represents the additional investment created by investment at existing facilities.

Source: Division of Research and Communications, S.C. State Development Board.

# Employment From Capital Investments

## By Fiscal Year

Existing New



Total	18,908	19,526	18,233	9,372	13,846
New	9,099	8,173	7,243	4,489	7,104
Existing	9,809	11,353	10,990	4,883	6,742

Includes Mfg, Distribution, Corp Headquarters, Research and Computer Related Services  
 Existing represents the additional employment created by expansion at existing facilities  
 Source: Division of Research and Communications, S.C. State Development Board

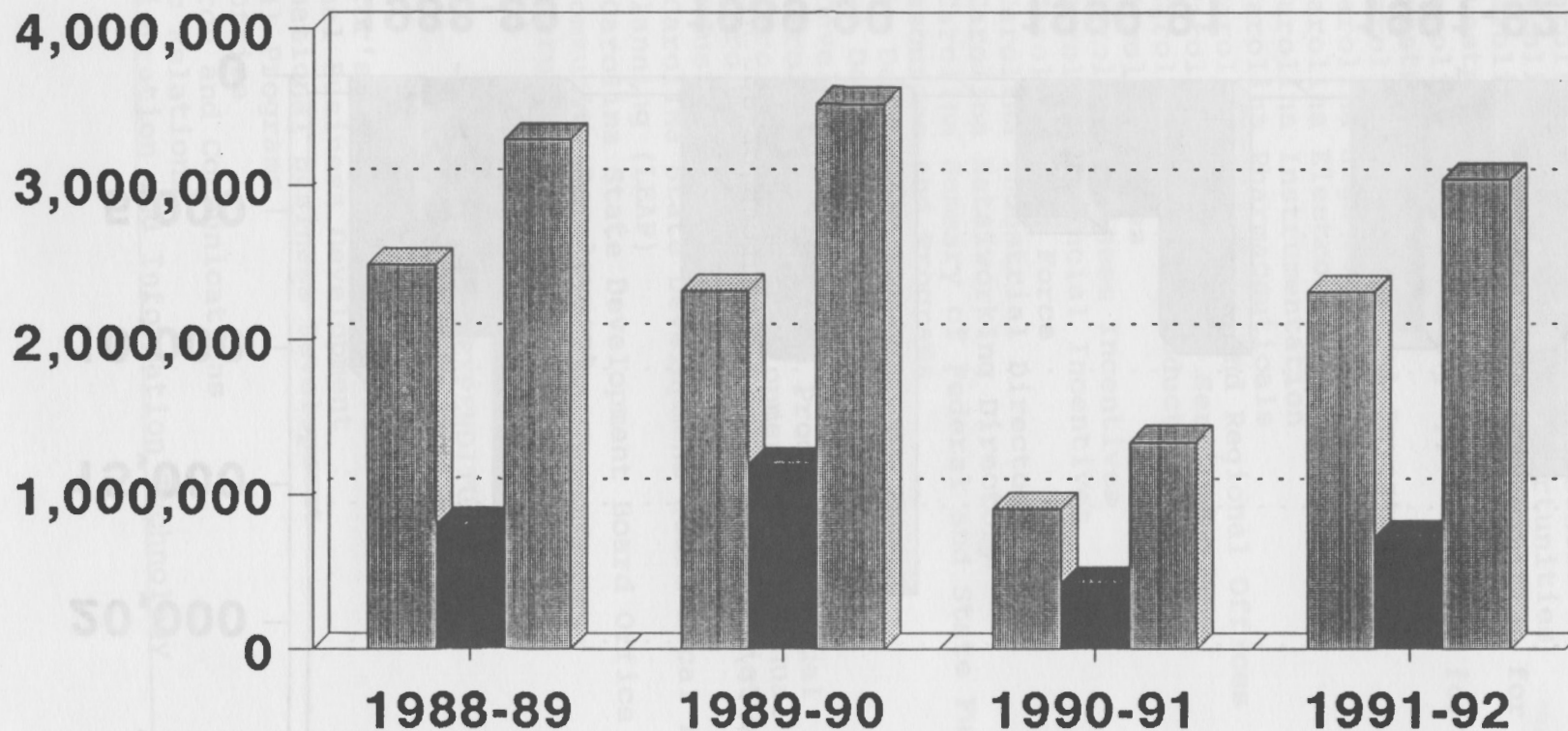


# Capital Investments

## By Fiscal Year

■ Urban ■ Rural ■ Total

Investments (\$000)



Urban	2,491,837	2,326,075	908,216	2,314,999
Rural	805,690	1,196,908	430,795	724,103
Total	3,297,527	3,522,983	1,339,011	3,039,102

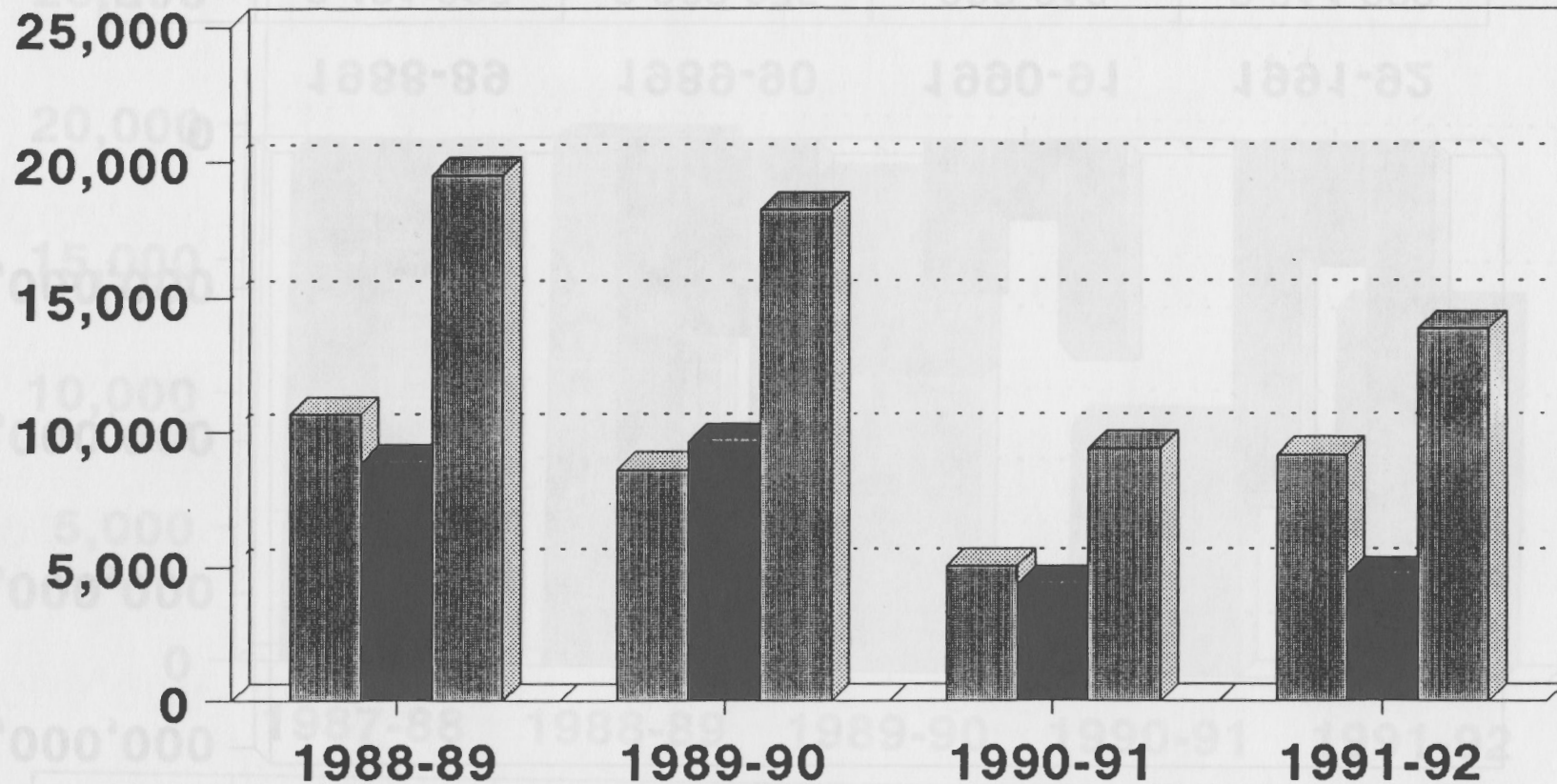
Includes Manufacturing, Distribution, Corporate Headquarters, Research and Computer Related Services

Source: Division of Research and Communications, S.C. State Development Board.

# Employment From Capital Investments

## By Fiscal Year

Urban Rural Total



Urban	10,658	8,598	5,010	9,137
Rural	8,868	9,635	4,362	4,709
Total	19,526	18,233	9,372	13,846

Includes Manufacturing, Distribution, Corporate Headquarters, Research and Computer Related Services

Source: Division of Research and Communications, S.C. State Development Board.



PUBLICATIONS OF THE SOUTH CAROLINA  
STATE DEVELOPMENT BOARD

South Carolina Profitability Package  
 South Carolina Junior Overview Brochure  
 South Carolina Manufacturing Opportunities  
 South Carolina Manufacturing Opportunities for Canadian  
     Investment  
 South Carolina Manufacturing Opportunities for German  
     Investment  
 South Carolina International Investment  
 South Carolina High Performance Plastics  
 South Carolina Electronics  
 South Carolina Instrumentation  
 South Carolina Pharmaceuticals  
 South Carolina Corporate and Regional Offices  
 South Carolina Information Services  
 South Carolina Medical Products  
 South Carolina Taxes  
 South Carolina Business Incentives  
 South Carolina Financial Incentives  
 South Carolina Work Force  
 South Carolina Industrial Directory, 1992  
 South Carolina Metalworking Directory  
 South Carolina Summary of Federal and State Funding  
     Resources and Programs  
 Economic Developments Magazine  
 Business Developments Newsletter  
 Rural Developments Newsletter  
 South Carolina Film Office Production Manual  
 South Carolina State Development Board Annual Report  
 South Carolina State Development Board Existing Business and  
     Industry Services  
 South Carolina State Development Board Local Economic Action  
     Planning (LEAP)  
 South Carolina State Development Board Office of Rural and  
     Community Development  
 South Carolina State Map

EXPENDITURES  
FISCAL YEAR 1991-92

Director's Office and the Board	\$ 242,961
National Business Development	804,194
International Business Development	1,542,470
Special Programs	1,267,984
Film Office	285,400
Research and Communications	1,788,277
Public Relations	310,305
<u>Administration and Information Technology</u>	<u>2,052,255</u>

Total	\$8,973,146
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Total Number of Documents Printed	255
Cost Per Unit	\$ 1.24
Printing Cost - S.C. State Budget & Control Board (up to 255 copies)	\$ 317.18
Printing Cost - Individual Agency (requesting over 255 copies and/or halftones)	\$
Total Printing Cost	\$ 317.18